

202

Home - NetSuite (Wolfe Electronics) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

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**NETSUITE™**

Home > Home Transactions Lists Reports Setup Support Intranet

Welcome to the NetSuite Test Drive!  
Getting started with NetSuite is easy. Click here for more details

**Custom Task Portlet Search (Due Date)**

New	Edit	View	Due Date	Task Title	Priority	Mark
			9/8/2003	Review E Auctions Online Proposal	Medium	Completed
			9/9/2003	Call Lawyers re: Telcoo Contract	High	Completed
			9/10/2003	Create something like an estimate for CTAA	Medium	Completed
			9/18/2003	Schedule Meeting with Broker	High	Completed
			11/20/2003	Change Insurance Carrier	Low	Completed
			11/22/2003	Review Health Ins	Medium	Completed

→ New → Update → Edit → Set Up

**Settings**

- Add Content
- Set Preferences
- Set Up Synchronization

**Top 5 Customers**

(Period Range: This Year)  
→ Update → Set Up

**Top 5 Sales Reps**

(Period Range: This Year)  
→ Update → Set Up

**Key Indicators**

Sales This Period	Bank Balance	Receivables	Payables	Orders This Year	New Cases Last Quarter	New Leads This Year	Forecast This Year
\$3,984.50	\$73,094.22	\$89,882.44	\$61,096.22	\$14,903.95	15	26	\$130,086.35

→ Update → Set Up

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FIG. 2

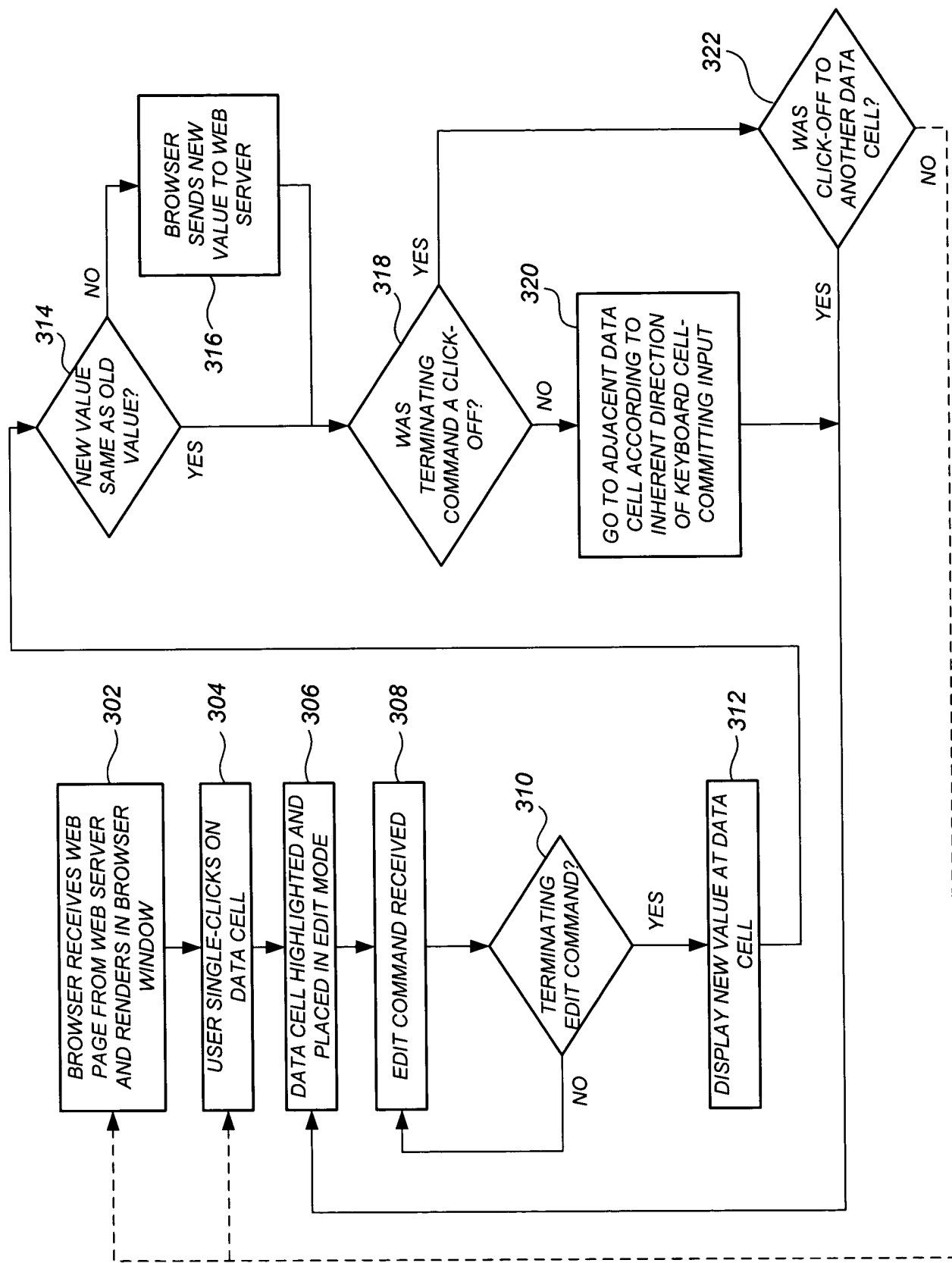


FIG. 3

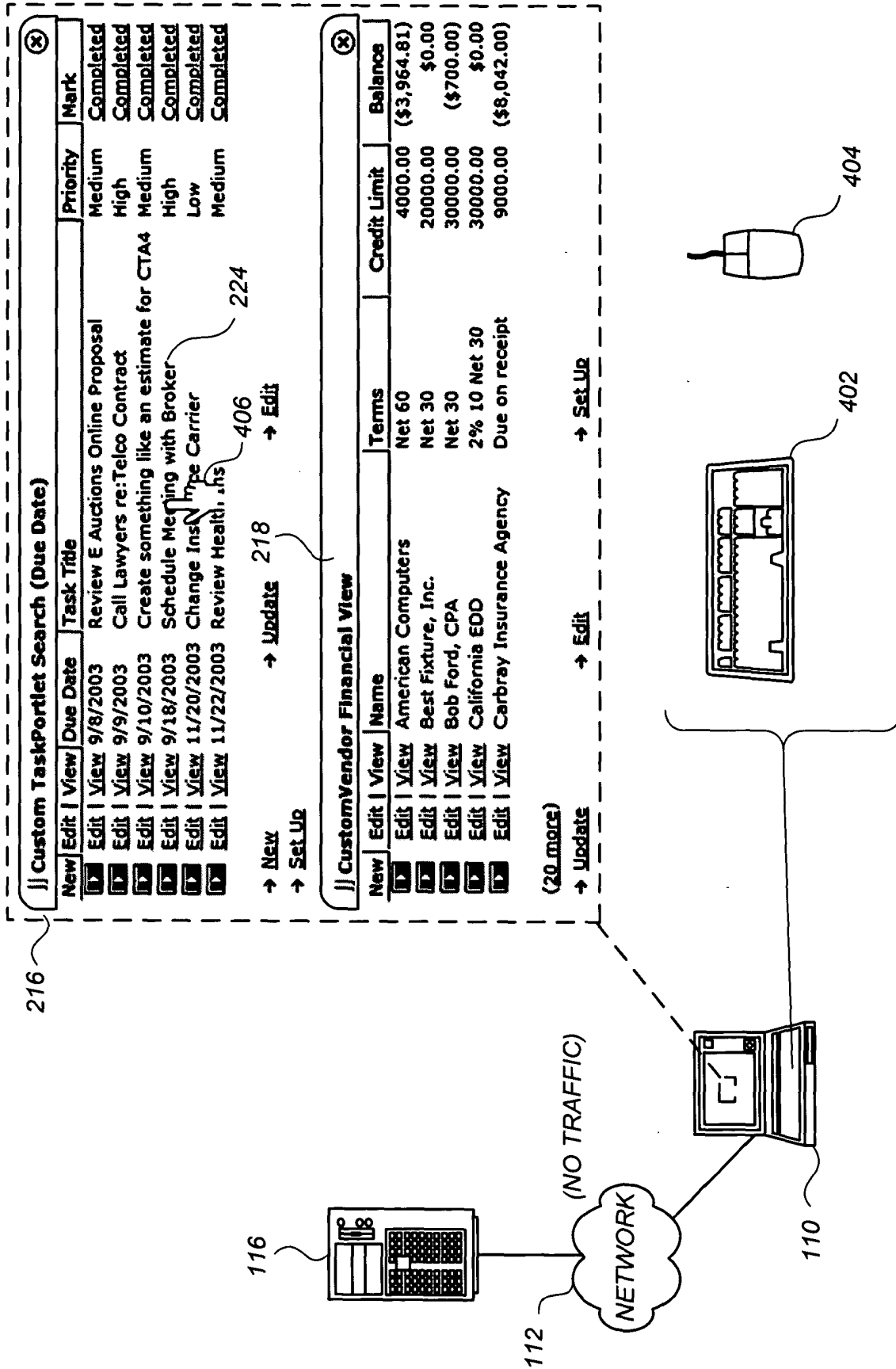
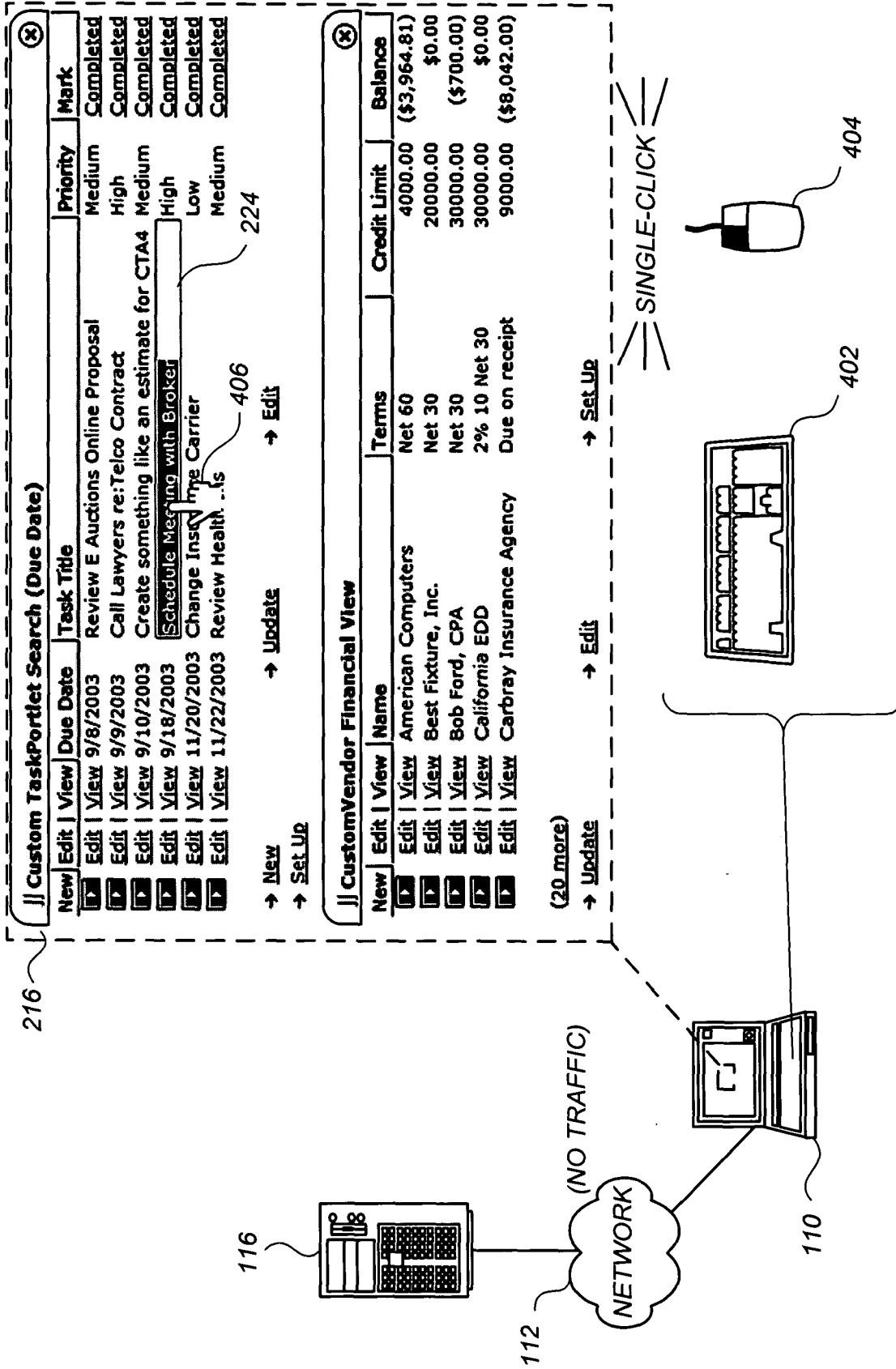


FIG. 4



# Custom TaskPortlet Search (Due Date)

New	Edit	View	Due Date	Task Title	Priority	Mark
			9/8/2003	Review E Auctions Online Proposal	Medium	Completed
			9/9/2003	Call Lawyers re: Telco Contract	High	Completed
			9/10/2003	Create something like an estimate for CTA4	Medium	Completed
			9/18/2003	Schedule Meeting with Broker	High	Completed
			11/20/2003	Change Insurance Carrier	Low	Completed
			11/22/2003	Review Health Insurance	Medium	Completed

→ New → Update → Edit

→ Set Up

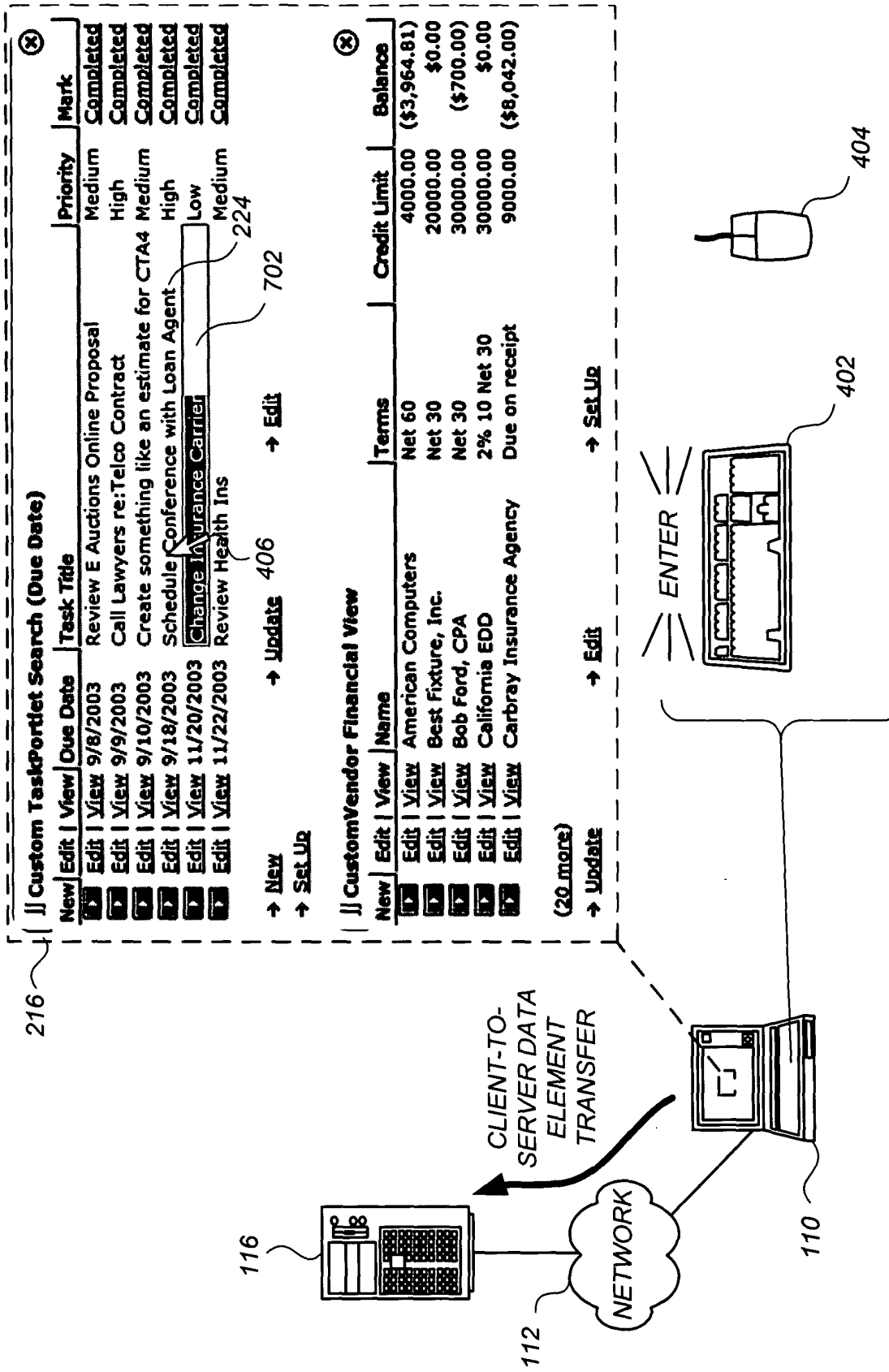
# Custom Vendor Financial View

New	Edit	View	Name	Terms	Credit Limit	Balance
			American Computers	Net 60	4000.00	(\$3,964.81)
			Best Fixture, Inc.	Net 30	20000.00	\$0.00
			Bob Ford, CPA	Net 30	30000.00	(\$700.00)
			California EDD	2% 10 Net 30	30000.00	\$0.00
			Carbray Insurance Agency	Due on receipt	9000.00	(\$8,042.00)

(20 more)

→ Update → Edit → Set Up





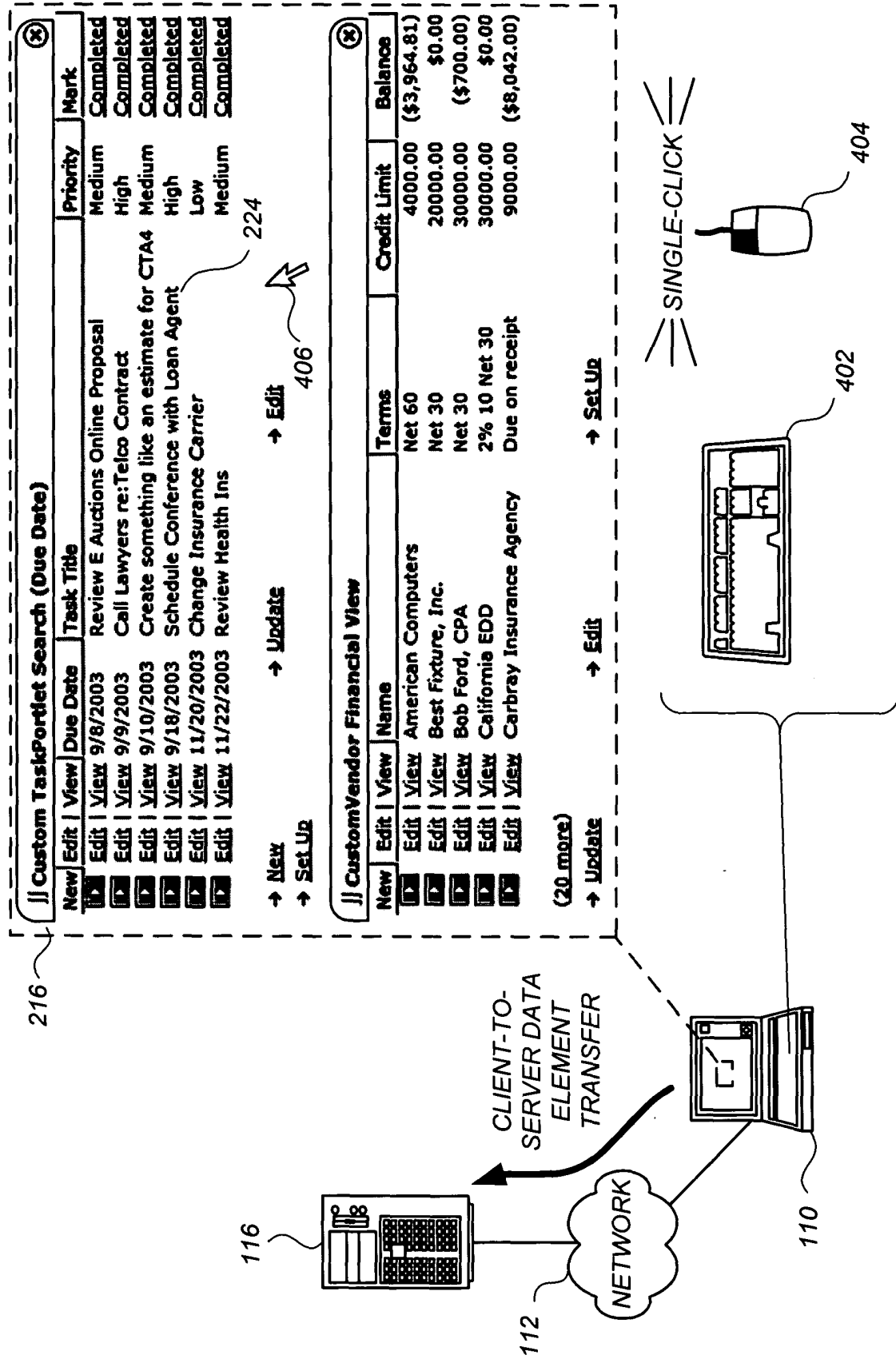


FIG. 8



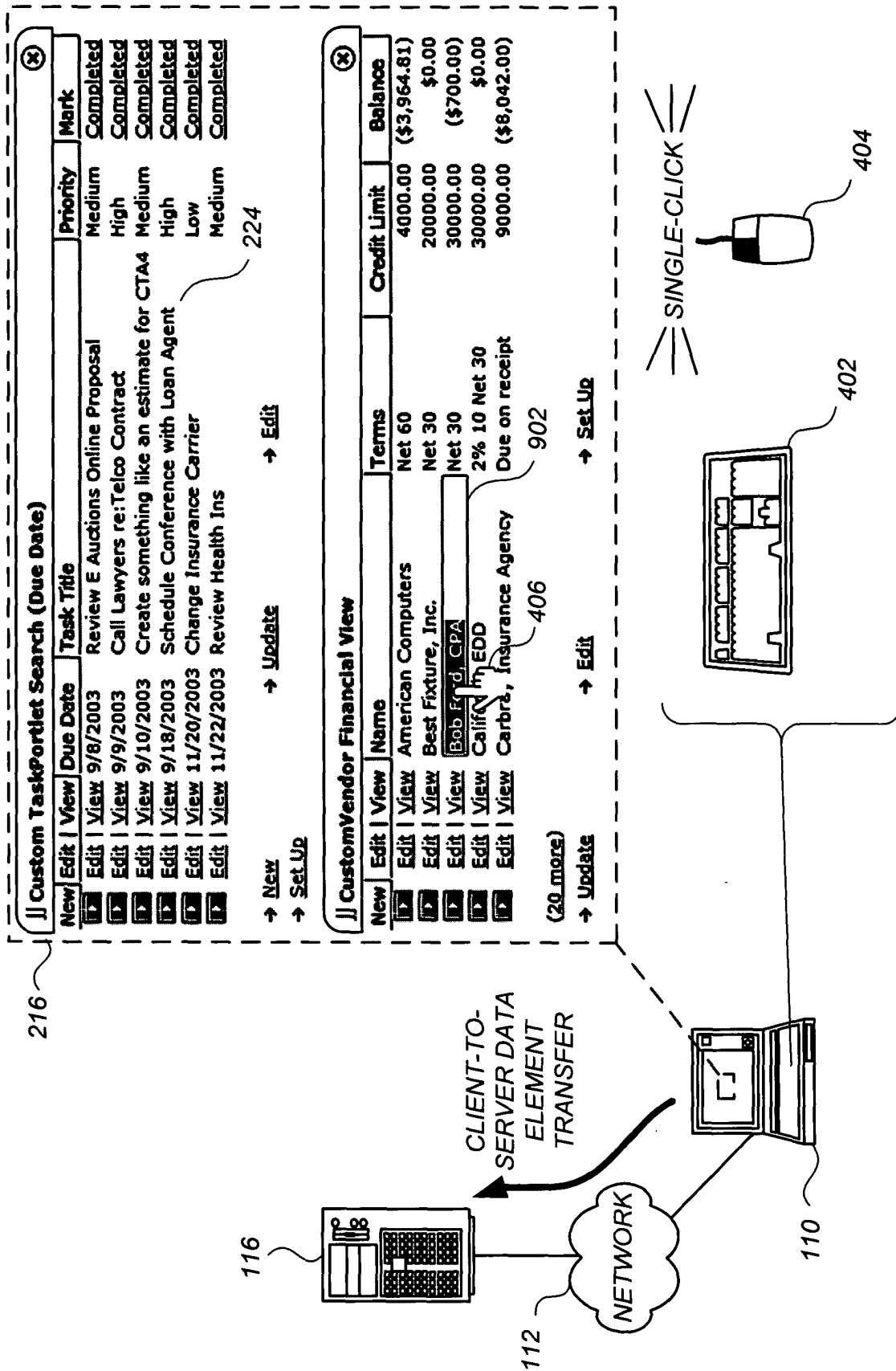


FIG. 9

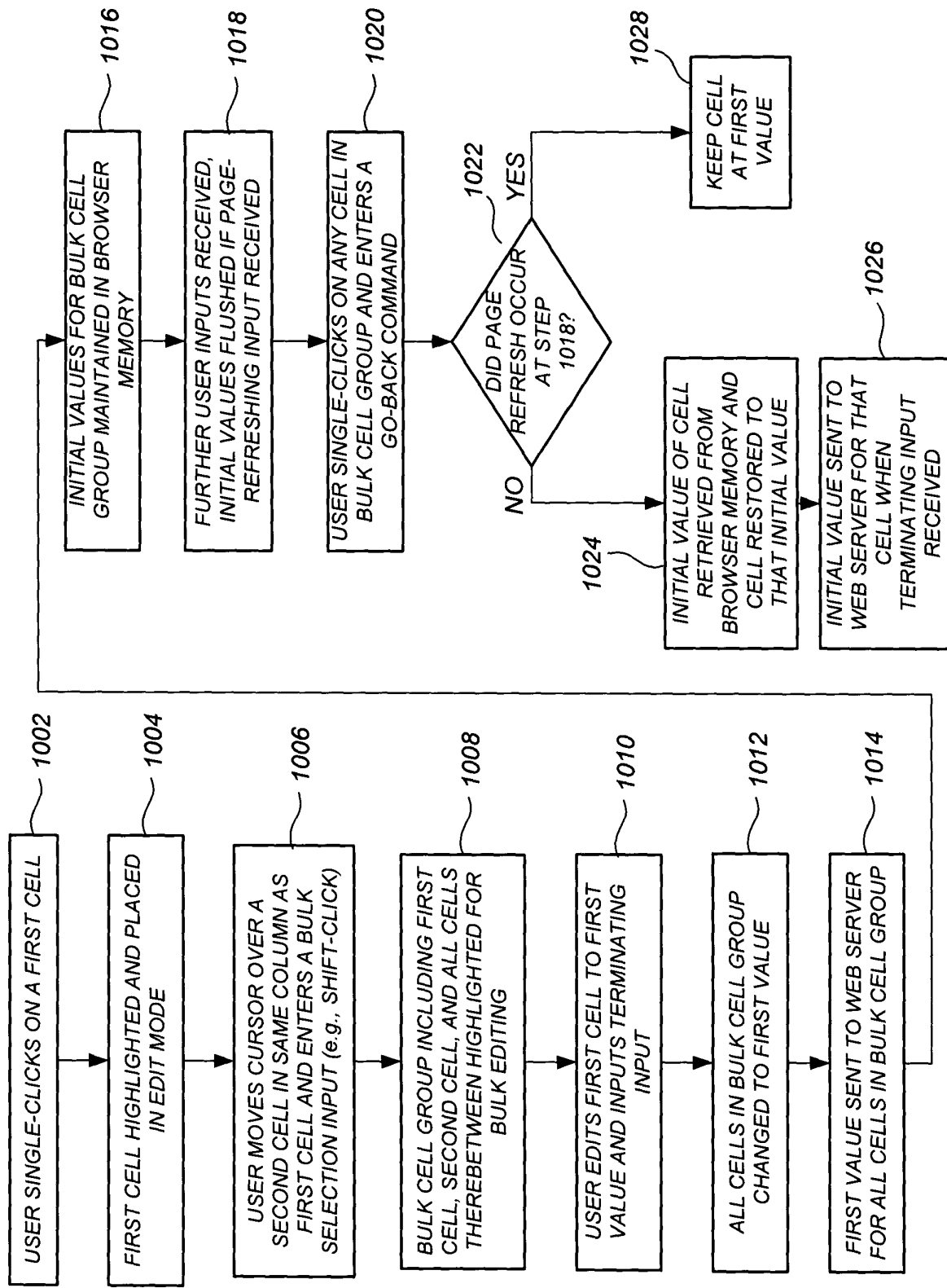


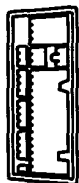
FIG. 10

# FIG. 11

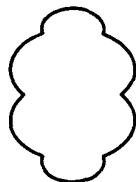
1102

1104

Custom Item CostView			
Edit   View	Name	Cost	Preferred Vendor
<u>Edit</u>   <u>View</u>	Accessories : Cable - Cat 5, 10 ft	3.50	American Computers
<u>Edit</u>   <u>View</u>	Accessories : Cable - Cat 5, 5 ft	2.00	American Computers
<u>Edit</u>   <u>View</u>	Accessories : Cable - IDE 406	2.19	Sullivan Distributors, Inc.
<u>Edit</u>   <u>View</u>	Accessories : Cable - Parallel	3.99	Sullivan Distributors, Inc.
<u>Edit</u>   <u>View</u>	Accessories : Cable - SCSI	3.49	Sullivan Distributors, Inc.
<u>Edit</u>   <u>View</u>	Accessories : Cable - Serial, 10 ft	1.99	Sullivan Distributors, Inc.
<u>Edit</u>   <u>View</u>	Accessories : Cable - USB 10 ft	3.89	Sullivan Distributors, Inc.



POSITION CURSOR



(NO TRAFFIC)

# FIG. 12

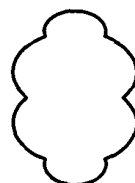
1102

1104

Custom Item CostView			
Edit   View	Name	Cost	Preferred Vendor
<u>Edit</u>   <u>View</u>	Accessories : Cable - Cat 5, 10 ft	3.50	American Computers
<u>Edit</u>   <u>View</u>	Accessories : Cable - Cat 5, 5 ft	2.00	American Computers
<u>Edit</u>   <u>View</u>	Accessories : Cable - IDE 406	2.19	Sullivan Distributors, Inc.
<u>Edit</u>   <u>View</u>	Accessories : Cable - Parallel	3.99	Sullivan Distributors, Inc.
<u>Edit</u>   <u>View</u>	Accessories : Cable - SCSI	3.49	Sullivan Distributors, Inc.
<u>Edit</u>   <u>View</u>	Accessories : Cable - Serial, 10 ft	1.99	Sullivan Distributors, Inc.
<u>Edit</u>   <u>View</u>	Accessories : Cable - USB 10 ft	3.89	Sullivan Distributors, Inc.



SINGLE-CLICK



(NO TRAFFIC)

# FIG. 13

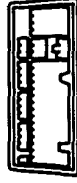
1102

1104

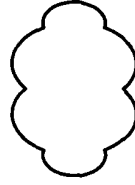
Custom Item CostView			
Edit   View	Name	Cost	Preferred Vendor
Edit   View	Accessories : Cable - Cat 5, 10 ft	3.50	American Computers
Edit   View	Accessories : Cable - Cat 5, 5 ft	2.00	American Computers
Edit   View	Accessories : Cable - IDE	2.19	Sullivan Distributors, Inc.
Edit   View	Accessories : Cable - Parallel	3.99	Sullivan Distributors, Inc.
Edit   View	Accessories : Cable - SCSI	3.49	Sullivan Distributors, Inc.
Edit   View	Accessories : Cable - Serial, 10 ft	1.99	Sullivan Distributors, Inc.
Edit   View	Accessories : Cable - USB 10 ft	3.89	Sullivan Distributors, Inc.

1302

406



MOVE CURSOR  
DOWN TO CELL 1302



(NO TRAFFIC)

# FIG. 14

1102

1104

Cust m Item CostView			
Edit   View	Name	Cost	Preferred Vendor
Edit   View	Accessories : Cable - Cat 5, 10 ft	3.50	American Computers
Edit   View	Accessories : Cable - Cat 5, 5 ft	2.00	American Computers
Edit   View	Accessories : Cable - IDE	2.19	Sullivan Distributors, Inc.
Edit   View	Accessories : Cable - Parallel	3.99	Sullivan Distributors, Inc.
Edit   View	Accessories : Cable - SCSI	3.49	Sullivan Distributors, Inc.
Edit   View	Accessories : Cable - Serial, 10 ft	1.99	Sullivan Distributors, Inc.
Edit   View	Accessories : Cable - USB 10 ft	3.89	Sullivan Distributors, Inc.

1302

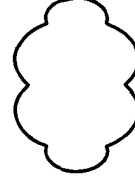
406



"SHIFT"

+

SINGLE-CLICK

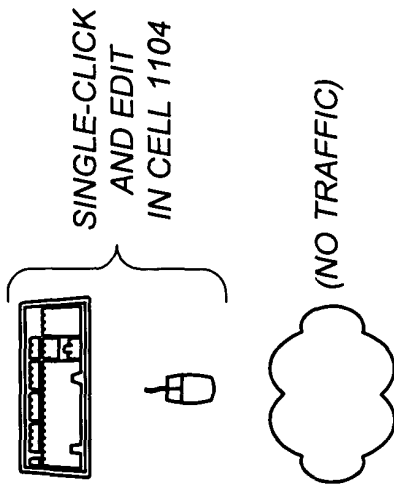


(NO TRAFFIC)

# FIG. 15

1102 1104 406

Custom Item CostView				Preferred Vendor	
Edit   View	Name		Cost		
<u>Edit</u>   <u>View</u>	Accessories : Cable - Cat 5, 10 ft		4.99	American Computers	
<u>Edit</u>   <u>View</u>	Accessories : Cable - Cat 5, 5 ft		2.00	American Computers	
<u>Edit</u>   <u>View</u>	Accessories : Cable - IDE		2.19	Sullivan Distributors, Inc.	
<u>Edit</u>   <u>View</u>	Accessories : Cable - Parallel		3.99	Sullivan Distributors, Inc.	
<u>Edit</u>   <u>View</u>	Accessories : Cable - SCSI		3.49	Sullivan Distributors, Inc.	
<u>Edit</u>   <u>View</u>	Accessories : Cable - Serial, 10 ft		1.99	Sullivan Distributors, Inc.	
<u>Edit</u>   <u>View</u>	Accessories : Cable - USB 10 ft		3.89	Sullivan Distributors, Inc.	



# FIG. 16

1102 1104 406

Cust m Item CostView				Preferred Vendor	
Edit   View	Name		Cost		
<u>Edit</u>   <u>View</u>	Accessories : Cable - Cat 5, 10 ft		4.99	American Computers	
<u>Edit</u>   <u>View</u>	Accessories : Cable - Cat 5, 5 ft		4.99	American Computers	
<u>Edit</u>   <u>View</u>	Accessories : Cable - IDE		4.99	Sullivan Distributors, Inc.	
<u>Edit</u>   <u>View</u>	Accessories : Cable - Parallel		4.99	Sullivan Distributors, Inc.	
<u>Edit</u>   <u>View</u>	Accessories : Cable - SCSI		4.99	Sullivan Distributors, Inc.	
<u>Edit</u>   <u>View</u>	Accessories : Cable - Serial, 10 ft		4.99	Sullivan Distributors, Inc.	
<u>Edit</u>   <u>View</u>	Accessories : Cable - USB 10 ft		3.89	Sullivan Distributors, Inc.	

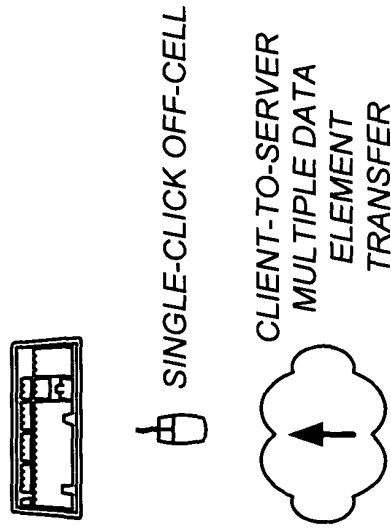
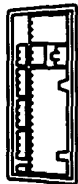


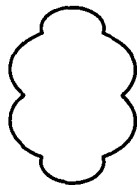
FIG. 17

1102

Custom Item CostView			
Edit   View	Name	Cost	Preferred Vendor
<u>Edit</u>   <u>View</u>	Accessories : Cable - Cat 5, 10 ft	4.99	American Computers
<u>Edit</u>   <u>View</u>	Accessories : Cable - Cat 5, 5 ft	4.99	American Computers
<u>Edit</u>   <u>View</u>	Accessories : Cable - IDE	4.99	Sullivan Distributors, Inc.
<u>Edit</u>   <u>View</u>	Accessories : Cable - Parallel	4.99	Sullivan Distributors, Inc.
<u>Edit</u>   <u>View</u>	Accessories : Cable - SCSI	4.99	Sullivan Distributors, Inc.
<u>Edit</u>   <u>View</u>	Accessories : Cable - Serial, 10 ft	4.99	Sullivan Distributors, Inc.
<u>Edit</u>   <u>View</u>	Accessories : Cable - USB 10 ft	3.89	Sullivan Distributors, Inc.



SINGLE-CLICK IN CELL  
REQUIRING GO-BACK

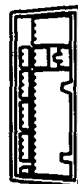


(NO TRAFFIC)

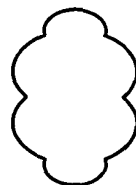
FIG. 18

1102

Custom Item CostView			
Edit   View	Name	Cost	Preferred Vendor
<u>Edit</u>   <u>View</u>	Accessories : Cable - Cat 5, 10 ft	4.99	American Computers
<u>Edit</u>   <u>View</u>	Accessories : Cable - Cat 5, 5 ft	4.99	American Computers
<u>Edit</u>   <u>View</u>	Accessories : Cable - IDE	2.19	Sullivan Distributors, Inc.
<u>Edit</u>   <u>View</u>	Accessories : Cable - Parallel	4.99	Sullivan Distributors, Inc.
<u>Edit</u>   <u>View</u>	Accessories : Cable - SCSI	4.99	Sullivan Distributors, Inc.
<u>Edit</u>   <u>View</u>	Accessories : Cable - Serial, 10 ft	4.99	Sullivan Distributors, Inc.
<u>Edit</u>   <u>View</u>	Accessories : Cable - USB 10 ft	3.89	Sullivan Distributors, Inc.



"CNTL-Z"

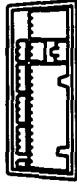


(NO TRAFFIC)

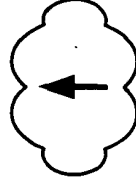
# FIG. 19

1102

Cust m Item CostView				406	
Edit   View		Name	Cost	Preferred Vendor	
Edit   View	Accessories : Cable - Cat 5, 10 ft		4.99	American Computers	
Edit   View	Accessories : Cable - Cat 5, 5 ft		4.99	American Computers	
Edit   View	Accessories : Cable - IDE		2.19	Sullivan Distributors, Inc.	
Edit   View	Accessories : Cable - Parallel	1702	4.99	Sullivan Distributors, Inc.	
Edit   View	Accessories : Cable - SCSI		4.99	Sullivan Distributors, Inc.	
Edit   View	Accessories : Cable - Serial, 10 ft		4.99	Sullivan Distributors, Inc.	
Edit   View	Accessories : Cable - USB 10 ft		3.89	Sullivan Distributors, Inc.	



SINGLE-CLICK OFF-CELL



CLIENT-TO-SERVER  
DATA ELEMENT  
TRANSFER

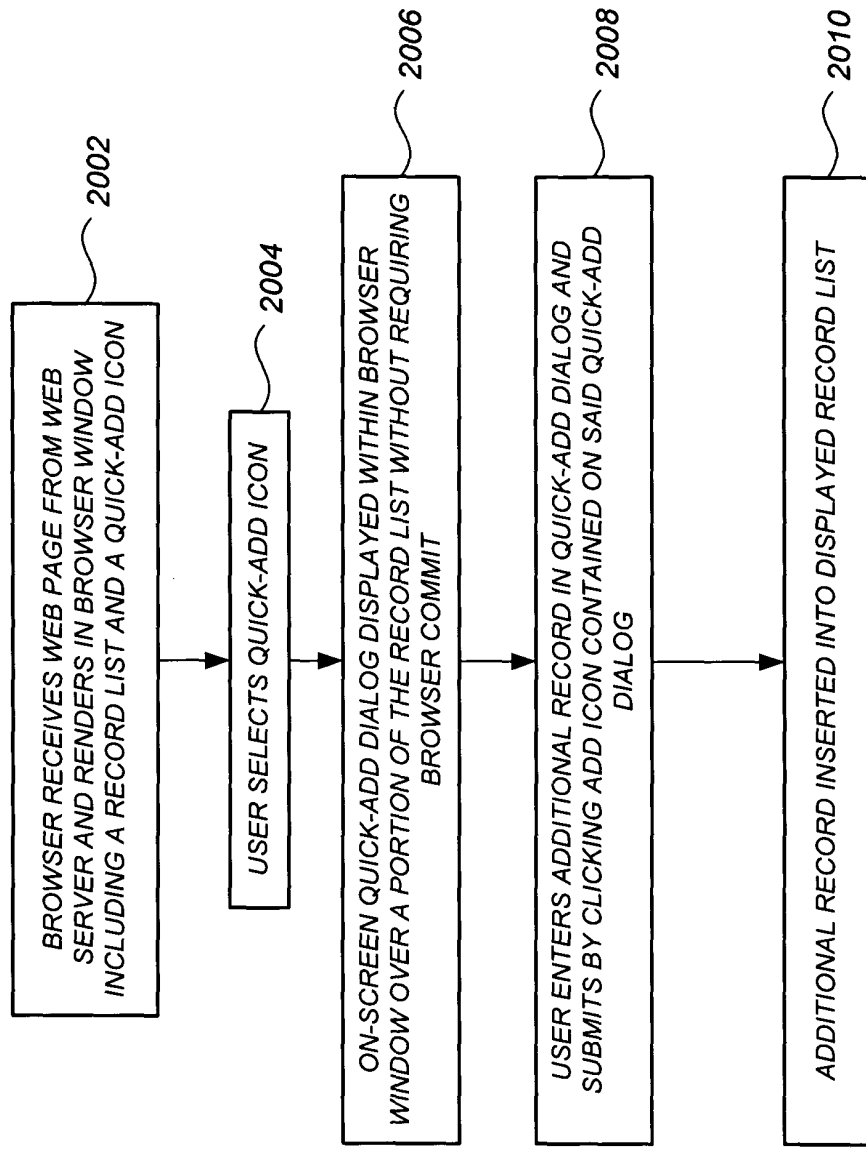


FIG. 20



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[Lists](#)
[Reports](#)
[Setup](#)
[Support](#)
[Intranet](#)

[Lists > Customers & Jobs >](#)

## Customers & Jobs

New	Edit	View	Name	Category	Company Name	Sales Rep	Phone
			A Wolfe	Individual	Wolfe Electronics	Clark Koozer	342-888-6567
			Andrew A. Anderson	Individual	AAA Driving School	A Wolfe	540-888-9876
			Andy Grove	Corporate	Intel Inc.	A Wolfe	206-555-1302
			Arnold Schwagger	Corporate	Terminator Industries	Sam R Cruz	800-555-0609
			Benny H. Waters	Corporate	Benihaha	A Wolfe	435-867-9999
			Bill Gates	Corporate	Microsoft Inc	A Wolfe	989-111-1234
			Brenda Brendawitz	Individual	Brendawitz Nursing	A Wolfe	877-987-7654
			Brian Chess	Individual	Chess Art Gallery	A Wolfe	831-555-5229
			Brian Sharpe	Individual	B-Sharp Music	Krista Barton	800-555-4681
			Cervantes V. Medeiros	Corporate	Cerveza La Beppo	Mark Grogan	650-555-7709
			Chuck E. Mozza	Corporate	Cheese Factory	Krista Barton	650/555-1212
			Eric B Schmidt	Individual	Schmidt Consulting	Neil Thomson	312-555-0704
			Fabrizio, Daniel B.	Corporate	Haystack Laboratories	Clark Koozer	222-222-2221

2104

2106

Total Found: 35

Stage Sales Rep - All - Show Inactives ☐ Report Style Company Show Quick Add ☐

FIG. 21

2108

2102

## Customers & Jobs

New	Edit	View	Name	Category	Company Name	Sales Rep	Phone
<input type="button" value="Add"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	A Wolfe	Individual	Wolfe Electronics	Clark Koozer	342-888-6567
<input type="button" value="Add"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	Andrew A. Anderson	Individual	AAA Driving School	A Wolfe	540-888-9876
<input type="button" value="Add"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	Andy Grove	Corporate	Intel Inc.	A Wolfe	206-555-1302
<input type="button" value="Add"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	Arnold Schwagger	Corporate	Terminator Industries	Sam R Cruz	800-555-0609
<input type="button" value="Add"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	Benny H. Waters	Corporate	Benihaha	A Wolfe	435-867-9999
<input type="button" value="Add"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	Bill Gates	Corporate	Microsoft Inc	A Wolfe	989-111-1234
<input type="button" value="Add"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	Brenda Brendawitz	Individual	Brendawitz Nursing	A Wolfe	877-987-7654
<input type="button" value="Add"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	Brian Chess	Individual	Chess Art Gallery	A Wolfe	831-555-5229
<input type="button" value="Add"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	Brian Sharpe	Individual	B-Sharp Music	Krista Barton	800-555-4681
<input type="button" value="Add"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	Cervantes V. Medeiros	Corporate	Cerveza La Beppo	Mark Grogan	650-555-7709
<input type="button" value="Add"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	Chad E. Moore	Corporate	Chase Eastman	Krista Barton	650-555-1212

2104

2202

2106

2204

2108

FIG. 22

2102

Lists > Customers & Jobs >

## Customers & Jobs

New	Edit	View	Name	Category	Company Name	Sales Rep	Phone
			A Wolfe	Individual	Wolfe Electronics	Clark Koozer	342-888-6567
			Alan Q. MacPherson	Individual	Strutz Pharmaceuticals	A Wolfe	650-464-9876
			Andrew A. Anderson	Corporate	AAA Driving School	A Wolfe	540-888-9876
			Andy Grove	Corporate	Intel Inc.	A Wolfe	206-555-1302
			Arnold Schwagger	Corporate	Terminator Industries	Sam R Cruz	800-555-0609
			Benny H. Waters	Corporate	Benihaha	A Wolfe	435-867-9999
			Bill Gates	Corporate	Microsoft Inc	A Wolfe	989-111-1234
			Brenda Brendawitz	Individual	Brendawitz Nursing	A Wolfe	877-987-7654
			Brian Chess	Individual	Chess Art Gallery	A Wolfe	831-555-5229
			Brian Sharpe	Individual	B-Sharp Music	Krista Barton	800-555-4681
			Penelope V. Madeline	Corporate	Penelope's Bann	Mark Gnanan	555-555-7770

2104

2302

2202

2106

2108

FIG. 23

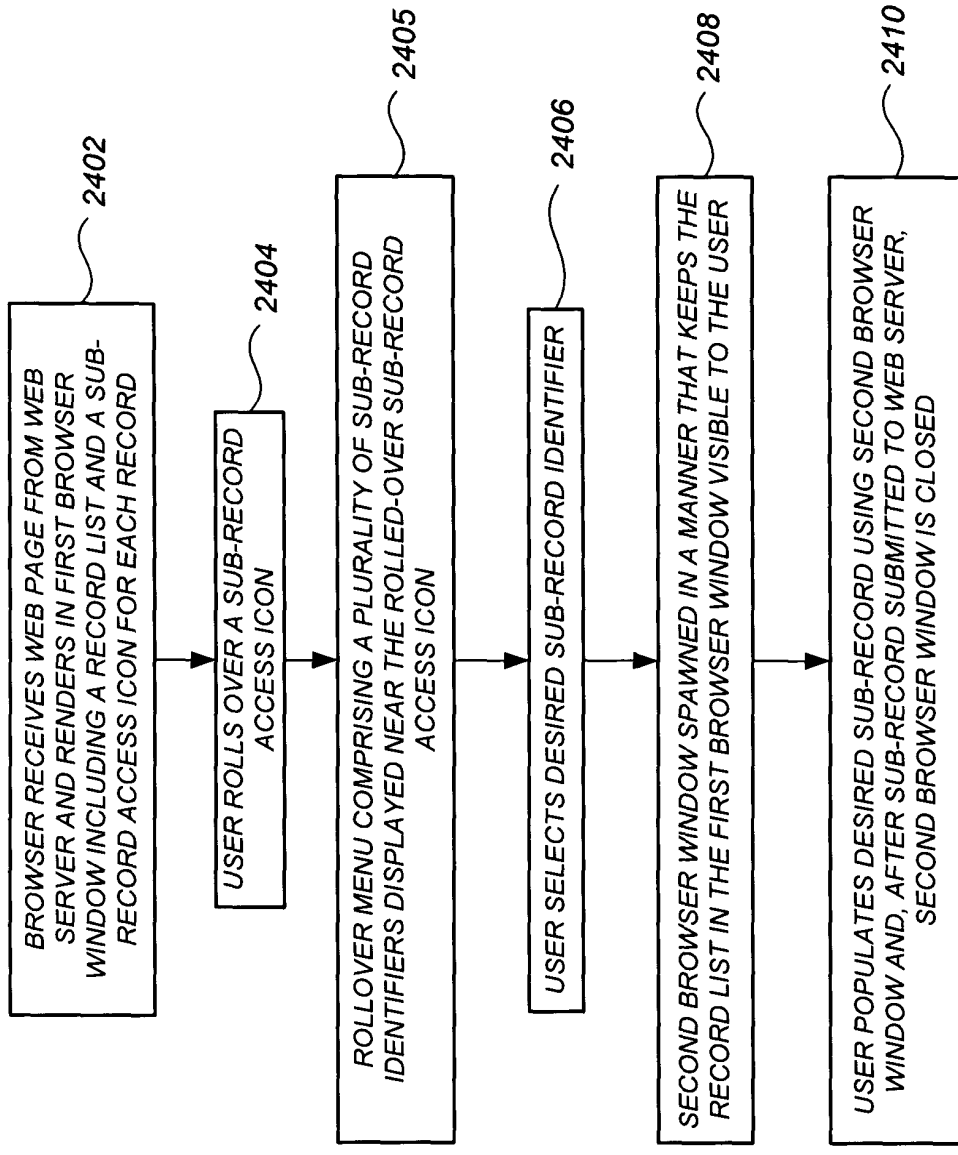


FIG. 24

FIG. 25

Customers & Jobs - NetSuite (Wolfe Electronics) - Microsoft Internet Explorer

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NETSUITE™

Home Transactions Lists Reports Setup Support Intranet

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Customers & Jobs >

Jobs

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2506

New Contact

New Task

New Call

New Event

New Note

Send E-mail

New Opportunity

New Estimate

New Invoice

New Sales Order

New Cash Sale

New Case

New Job

New Warranties

Delete Record

Wolfe

John Q. MacPherson

Andrew A. Anderson

Andy Grove

Timothy Schwagger

Henry H. Waters

Bill Gates

Terence Brendawitz

Alan Chess

Alan Sharpe

Servantes V. Medeiros

Individual

Individual

Corporate

Corporate

Corporate

Corporate

Individual

Individual

Individual

Corporate

Wolfe Electronics

Strutz Pharmaceuticals

AAA Driving School

Intel Inc.

Terminator Industries

Benihaha

Microsoft Inc

Brendawitz Nursing

Chess Art Gallery

B-Sharp Music

Cerveza La Beppo

Clark Koozer

A Wolfe

A Wolfe

A Wolfe

Sam R Cruz

A Wolfe

A Wolfe

A Wolfe

A Wolfe

Krista Barton

Mark Grogan

342-888-6567

650-464-9876

540-888-9876

206-555-1302

800-555-0609

435-867-9999

989-111-1234

877-987-7654

831-555-5229

800-555-4681

650-555-7709

Stage Customer

Total Found: 36

Report Style View Company

Show Quick Add

New

Print

Customize View

Export

FIG. 26

3 Note - NetSuite (Wolfe Electronics) - Microsoft Internet ...

Note

Title  Date 9/8/2003

Type  Time 7:37 pm

Direction

New information: as it turns out, the cust

Memo

Save Close

2602

electronics) - Microsoft Internet Explorer

Sign Out | Help | Global Search

Go

Home Transactions Reports Setup Support Intranet

2104

List > Customers & Jobs >

### Customers & Jobs

New	Edit	View	Name	Category	Company Name	Sales Rep	Phone
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	A Wolfe	Individual	Wolfe Electronics	Clark Koozer	342-888-6567
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Alan Q. MacPherson	Individual	Strutz Pharmaceuticals	A Wolfe	650-464-9876
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Andrew A. Anderson	Corporate	AAA Driving School	A Wolfe	540-888-9876
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Andy Grove	Corporate	Intel Inc.	A Wolfe	206-555-1302
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Arnold Schwagger	Corporate	Terminator Industries	Sam R. Cruz	800-555-0609
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Benny H. Waters	Corporate	Bentaha	A Wolfe	435-867-9999
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bill Gates	Corporate	Microsoft Inc.	A Wolfe	989-111-1234
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Brenda Brendawitz	Individual	Brendawitz Nursing	A Wolfe	877-987-7654
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Brian Chess	Individual	Chess Art Gallery	A Wolfe	831-555-5229
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Brian Sharpe	Individual	B-Sharp Music	Krista Barton	800-555-4681
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Cervantes V. Medeiros	Corporate	Cerveza La Beppo	Mark Grogan	650-555-7709

2502

Sales Rep - All - Stage Customer Total Found: 36

Show Inactives Report Style View Company Show Quick Add New Print Customize View Export